

OPNAV Taskers V3.0 User's Manual

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PURPOSE

The Chief of Naval Operations (OPNAV) Staff has undertaken a revolutionary change with respect to the daily operations and methods associated with staff work. Through the adoption of standards and recommendations set forth by Task Force Whiskey (TFW) (Web Enabled Navy), Task Force Papa (Processes) as well as early web initiatives, OPNAV has focused on improving the quality of service for its deckplate personnel in order to similarly improve the quality of product that they produce.

Building upon the previous success of the Logistics and Readiness Directorate (N4), OPNAV has already adopted Taskers 2.0 for all of its directorates. While greatly improving the tasking process both up and down the chain of command, this system was not designed to support OPNAV-wide both in terms of scope and functionality. Taskers 3.0 will address these shortcomings giving the OPNAV staff the ability to centrally task and track *all* OPNAV taskers for the first time ever. Based upon numerous working group meetings and one-on-one interviews, Taskers 3.0 will also improve upon the user interface of the current tasking system giving action officers and front office personnel an easier and more intuitive interface. All

together Taskers 3.0 will make OPNAV staff work quicker and easier for the action officer while providing an end product to senior staff that is more accurate, reliable and historically based.

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PRIVACY / SECURITY / APPROPRIATE USE

This is a U.S. Government Computer System. This World Wide Web site is for official use by members of the OPNAV Staff. This service is provided by the office of the OPNAV Chief Information Officer (OPNAVCIO@hq.navy.mil).

Federal Government communications systems and equipment, including electronic mail and internet systems, may be used for authorized purposes only. Authorized purposes include communications that:

- serve a legitimate public interest, including educating or enhancing the professional skills of DoD employees;
- do not put Federal Government communication systems to uses that would reflect adversely on DoD or the DoD Component such as chain letters; unofficial advertising, soliciting or selling; violations of statute or regulation; inappropriately handled classified information; and other uses that are incompatible with public service; and
- do not overburden the communication system (such as may be the case with broadcasts and group mailings) or create significant additional cost to DoD or the DoD component.

These restrictions prohibit product endorsements or preferential treatment.

The Procurement Integrity Act prohibits present and former U.S. officials, including members of the Armed Forces, from disclosing contractor bid or proposal information or source selection information before the award of Federal agency procurement contract. The Act also prohibits unauthorized individuals from obtaining such information before the award of a Federal agency procurement contract.

Protected bid or proposal information include bid prices and sealed bids; proposed costs or prices; source selection plans; technical evaluation plans; technical evaluations of proposals; cost or price evaluations of proposals; competitive range determinations; rankings of bids, proposals or competitors; reports and evaluations of source selection panels, boards or advisory councils; and other information marked "source selection information" the disclosure of which would jeopardize the integrity or successful completion of the procurement.

Use of this web site for private gain is prohibited. Users shall not engage in financial transactions using nonpublic Government information or take any action that adversely affects the confidence of the public in the integrity of the Government.

Use of this web site constitutes acknowledgement of the above limitations and users agree to abide by those limitations. Failure to comply will result in loss of access to the web site and may violate criminal statutes. Misuse may subject users to criminal sanctions.

Although authorized users are encouraged to contribute content to the site, unauthorized attempts to upload information or change information on this web site are strictly prohibited and may be punishable under the Computer Fraud and Abuse Act of 1986. For site security purposes and to ensure that this service remains available to all users, this government computer system employs software programs to monitor network traffic to identify unauthorized attempts to upload or change information, or otherwise cause damage. Although this is not a public site, proper use of byline/photo/image credits is appropriate.

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Site Assistance / User Name and Password

Most of your questions or concerns can be resolved through the HQWeb Help Desk at helpdesk@rgsinc.com or (800) 420-7302. For site management and policy issues, you may need to contact the Chief Information Office of the OPNAV Staff at OPNAVCIO@hq.navy.mil or (703) 602-5124. If you forget your password, you can have it automatically reset and emailed to you using the link found in the HQWeb Help and the Taskers V3 Help (currently only the unclass side has this automatic feature).

[https://usn.hq.navy.mil/OPNAV/opnavreg.nsf/\(\\$ForgotPassword\)?OpenForm](https://usn.hq.navy.mil/OPNAV/opnavreg.nsf/($ForgotPassword)?OpenForm)

You can also email the help desk directly at helpdesk@rgsinc.com and request that your password be reset.

Your default User Name for HQWeb is your first name, space, middle initial, space, and last name. If your middle initial was not entered when your account was created, then it will not appear in your User Name. Your User Name *is not* case sensitive.

When your account is established or reset, you will receive an automatically generated password. This password is different from person to person but it is recommended that you change this password to something that is both more secure and easier for you to remember. The link to “change your password” can be found on the Directory edit screen. Although there are no restrictions imposed upon your password, it is recommended that you use at least 8 characters and that those characters include letters (upper and lower case), numbers, and punctuation marks. Your Password *is* case sensitive.

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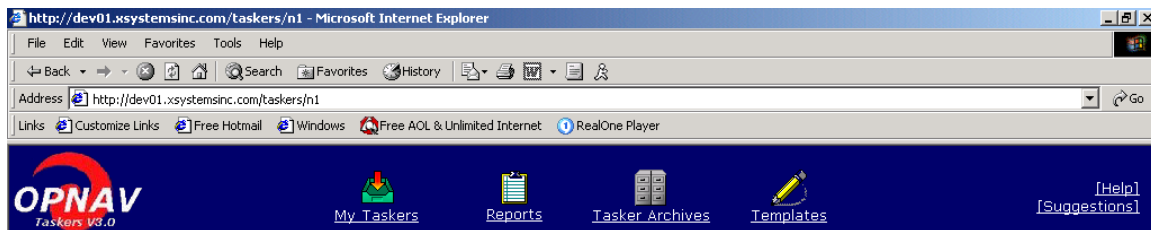
FUNCTIONAL OVERVIEW

When the term Action Officer is used in this document, it refers to the person who is responsible for taking action on tasks, including assigning additional individuals to take action. Although there may be some exceptions, it is assumed that the AO is the last person assigned the Lead role.

1. Global Navigation

The Global Navigation Bar will appear on every page of the Taskers V3.0 (TV3) site and contains links to the following:

Elements/Links:	Functionality/Description:
My Taskers	My Taskers View, which includes My In Box and My Monitored
Reports	Tasker Reports View
Tasker Archives	Tasker Archive for ALL OPNAV
Help	Help Page
Suggestions	Suggestions Page
Templates	OPNAV Templates



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2. My Taskers - Welcome Page (My Inbox & My Monitored Tasks)

OPNAV Taskers V3.0

My Taskers Reports Tasker Archives Templates

[Help] [Suggestions]

Welcome Teresa Ball **[TEST ONLY]**

[Create Tasker]

Directorate Tasker Search

Search [Advanced Search](#)

Export to Excel: [\[My Inbox\]](#) [\[My Monitored\]](#)

My Inbox <small>(Tasks for which I am the Lead or the next to "Chop")</small>				
Front Office Due Date	Subject	Type	Role	Originator
6/7/02	Mandatory Field Test 05_28_02	Individual-USN	Chop	YN3 Veronica Vann
6/14/02	Mandatory Field Test 2	Contractor ActionLead		YN3 Veronica Vann

My Monitored <small>(Tasks I have chosen for monitoring, for which I am a "Coordinate", or I am a "Lead" and it is submitted for "chop")</small>				
Originator Due Date	Subject	Type	Lead	Originator
6/21/02	Mandatory Field Test 05_28_02	Individual-USN	NI	YN3 Veronica Vann

When you log in to the Tasker system, you will see a “My Taskers” Welcome Screen, as shown above. All Taskers requiring by you will be in My Inbox. All Taskers you choose to monitor, or watch, will be in My Monitored.

Elements:	Functionality/Description:
Create Tasker	Links to Create New Tasker form, which is available to all users (see Section 3 Create New Task / Edit Task)
My Inbox	A personalized Tasker Page that provides a list of all tasks for which: <ol style="list-style-type: none"> you have been assigned a Lead role AND none of the OPNAV Chop Chain blocks have been marked complete, OR you have been assigned as the next “chop” on the OPNAV Chop Chain.
My Monitored Tasks	Allows you to keep track of tasks for which you either: <ol style="list-style-type: none"> have a formal role of Lead, AND at least one OPNAV Chop Chain box has been marked complete (indicating their action has been completed; they are just monitoring the task through its completion), OR have a formal role of Coordinate OR have some interest, despite the fact that you were not assigned a formal role, and you have specifically marked the task for monitoring by clicking “Monitor This Task” Link. <p>NOTE: If an item is in your monitored tasks already, you’ll only see the “remove</p>

	monitor” option on your screen at the top of the tasker, while in Edit mode. But if it’s NOT in your monitored taskers yet, you’ll see the “Monitor This task” option.
Search	Launches a search on all open tasks in the user’s Directorate. Accepts Boolean entries.
Advanced Search	When the Advanced Search option is selected, a new window will open to display the Knowledge Portal, thus allowing a search of taskers from other directorates.

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3. Create New Task / Edit Task

The screenshot displays the OPNAV Taskers V3.0 web interface. At the top is a navigation bar with icons for 'My Taskers', 'Reports', 'Tasker Archives', and 'Templates', along with links for '[Help]' and '[Suggestions]'. Below this is a header section with the DCN '2002UStaff-000001b' and Status 'Open'. The main content area is divided into several sections: 'Key Words' (Carl Vinson), 'Type' (ENS Candace Griffin), 'External DCN', 'Received Date' (04/18/2002), 'Originator Due Date' (05/17/2002), 'OPNAV Approval Authority Due Date' (05/03/2002), 'Tasking Authority' (Candace Griffin), 'OPNAV Approval Authority' (CNO), 'Action Products' (Brief), 'Tasker Package' (Unit Testing_Part 1.xls (36 kB)), 'Final Response', and 'Working Area (drafts, references)'. Below these are 'Coordination Status' (manually updated) and 'Assignment and Status' (4/18/02 reassignment to N13). A 'Discussion Thread' section is also present. At the bottom, there is an 'Assignments and Chop Chain' section with 'Routing' (Lead: N13 Front Office, Coordination: EXW 91 Front Office, Information: N122D1D... LT Jill Alston) and a 'Chop Chain' list (CNO, VCNO, DNS, N13 Front Office). A 'Tasker History' section is at the very bottom.

OPNAV Taskers V3.0

[My Taskers](#) [Reports](#) [Tasker Archives](#) [Templates](#) [\[Help\]](#) [\[Suggestions\]](#)

[\[Email\]](#) [\[Monitor This Task\]](#) [\[Edit\]](#)

DCN: 2002UStaff-000001b **Status:** Open

Subject: USS Carl Vinson arrival

Key Words: Carl Vinson
SSIC:
Serial:

Type: ENS Candace Griffin
External DCN:
Received Date: 04/18/2002
Originator Due Date: 05/17/2002
OPNAV Approval Authority Due Date: 05/03/2002
Tasking Authority: Candace Griffin
OPNAV Approval Authority: CNO
Action Products: Brief

Tasker Package
[Unit Testing_Part 1.xls \(36 kB\)](#)

Final Response
Working Area (drafts, references)

Coordination Status
(manually updated)

Assignment and Status
4/18/02 reassignment to N13

N13 Front Office Concur with no comment
DEA Recommend Approval

Discussion Thread (Amplification, Comments, Questions) [\[Enter Comment\]](#)

Assignments and Chop Chain

Routing


Lead: N13 Front Office
Coordination: EXW 91 Front Office
Information: N122D1D... LT Jill Alston

Chop Chain

- CNO .
- VCNO .
- DNS .
- N13 Front Office .

Tasker History:

When you click the “Create New Task” option from the “My Taskers” Welcome screen, the editable form is displayed. You enter the new task information into the system and assign it to the appropriate group(s) and/or directorate(s). This form is available to all users, and all users can create a tasker and assign it to any directorate. Every field on the form is open/editable to all users of the system. To edit a taskers, click the “Edit” option link.

Mandatory fields are marked with a “star.” 

All changes made to the fields will be logged in the history, unless otherwise specified.

Elements:	Functionality/Description:
Email	Provides a drop-down pick list which provides access to a web-based email form. See Section 6 Email Tasker
Cancel	Exits the New Task/Task Edit form without submitting any changes to the tasker, and returns to previous screen (Welcome Screen or View Task screen). A prompt will appear asking if really want to cancel this document.
Submit	Submits all information from the form into the database “creating” the tasker or recording any changes that were made to the task. Clicking this link also prompts generation of all appropriate email notifications. (see Section Email Notification for email notification information)
Delete (Limited Availability)	<p>Removes the selected tasker from the system. The Delete Link is only available to members of the tasking authority who created the tasker and individuals with select administrator privileges. The Tasking Authority is typically a group (CTTA, JACO, N4-which is actually the N4 Front Office) but it can be an individual. Since Internal Tasks are being eliminated in Taskers Version 3, individuals can also act as a Tasking Authority. If this happens, the author of the document has an option in the tasking authority drop down. This means that the author of the document is the only one who can delete it besides administrators.</p> <p>The deleted item will go into an administrator pool, and an email will go to the creator notifying them that the tasker has been deleted. The change history log will capture the username and date when a person deletes, thus if the administrator has to bring it back it will be shown that it was deleted. The tasker will be formally and irrevocably deleted 30 days after the user deletes it.</p>
DCN Bar	Area where the <u>automatically generated</u> Tasker DCN will be displayed. These numbers will continue to use the current format.
Subject box Mandatory Field	Form field (text) provided to enter the Subject of the task. Mandatory Field
Type Picklist Mandatory Field	Used to indicate the type of task – chosen from a picklist (drop-down list) of provided types. Mandatory Field
Originator Box Mandatory Field	<p>Form field (text) used to indicate the originator of the task. Default value is the rank and full name of the logged-in user. The default can be overwritten, which will be the case for tasks that originated from individuals like SECNAV or Senator Warner. Mandatory Field</p> <p>Note: For tasks originated by an individual rather than a group like the CTTA or a Directorate, the Tasking Authority will be the Authors name</p>
Tasking Authority (Entered by) Mandatory Field	<p>Picklist (drop down list) that determines who the Tasking Authority of that Tasker is. This will default to the organization that the user entered through (ie, N1, N2, etc...) The list of Tasking Authority are:</p> <ul style="list-style-type: none"> • CNO • VCNO • DNS • CTTA • DONPIC • JACO • CEBGroup • SECNAV • N091 • N093 • N096 • N097 • N09W • N1 • N2 • N3N5 • N4 • N6 • N7 • N8 • NAVSEA • (User name at login)
OPNAV Approval Authority Mandatory Field	<p>Picklist (drop-down list) that determines what level of the chain of command will have the authority to “close out” the tasker before it goes to the Tasking authority.</p> <p>Mandatory field.</p> <p>This builds the default chop chain, which can then be modified. If the OPNAV approval authority is CNO, then</p>

	CNO, VCNO and DNS automatically appear in chop chain, for first go round. (Thus, if they are later removed, it's not reinserted.) When the VCNO is selected as the OPNAV Approval Authority, the DNS will automatically be listed in the chop chain. If DNS is selected then DNS and Lead are defaults, and if a Directorate is selected then the Directorate and the Lead are defaults in the chop. Additions and deletions to the chop chain will be captured in the log history.
Front Office Due Date Mandatory Field	Form field (date format MM/DD/YYYY) provided to enter the date that the tasker response is due to the front office that has completion authority. Mandatory Field Overdue tasks are based on this due date.
Originator Due Date Mandatory Field	Form field (date format MM/DD/YYYY) provided to enter the date that the tasker response is due to the originator (e.g., SECNAV, Congressman Campbell). Mandatory Field
Received Date Mandatory Field	Form field (date format MM/DD/YYYY) used to enter the date that the task was received by the Tasking Authority. Should default to the current date. The user can overwrite the default.
External DCN Box	Form field (text) provided to enter any Document Control Number (DCN) assigned to the tasker before it was received by OPNAV.
Key Words Box	Form field (text) in which users can enter key words (comma or semi-colon delineated) that can be used to identify the task in searches.
SSIC Box	Form field provided to enter appropriate SSIC. (<i>Standard Subject Indicator Code</i>).
Serial # Box	Form field for entry of the outgoing mail serial number if the task requires outgoing correspondence. (<i>If the recipient of a serialized letter contacts OPNAV with a question, this is a means of finding the associated task</i>).
Duplicate tasker check	Checks for duplicate Subject and External DCN. If a match is found, a pop-up window will list the matching tasks showing External DCN and Subject (subjects displayed as links). The search is based on Subject (exact match) and External DCN. The feature will search all active (i.e., not complete) OPNAV tasks (includes all Directorates). <i>Technical note: view search on both for tight, fast response.</i>
Restrict access to assignees	Selecting this check box restricts the viewing of the tasker to only those people and groups in the final assignment boxes (e.g., Lead, Coordinate, Information) AND any people or group added to the Approval Chop Chain. Tasker will only appear in reports or views accessed by those same individuals or the tasking authority. Note: If a tasker is restricted the only people that can read or edit are the people in the chop chain, assignees and of course the admin group and the servers. If the "Front Office" group is part of the chop chain or assigned a role, they will be able to see the task. Otherwise, it will be "restricted" from them. Example: If a tasker is restricted all assigned and all in chop chain can see it, and if someone from N1 is added then that person can also see it, but not all of N1. If they add N12Front office then the folks in N12 Front office can see it. If CNO or VCNO are on the chop, the people in that group can also see it. Thus, anyone on the tasker, be they the originator, the lead, the coordinate person, can go in and add other folks to participate/provide access to the task, and that will be logged, so everyone will know who did it.
Set email priority to high	Sends email notifications with the "high priority" Red Flag when received by MS Outlook.
Action Products	List of items needed to respond to tasker. Holding down the CTRL key enables the user to select multiple action products.
Tasker Package	Add and delete attachments that represent the task. <i>The various document controls are only visible in the Edit mode.</i> Maximum number of attachments is three (3).
Final Response	Area and controls used for the addition and deletion of attachments that represent the official response to the task. <i>The various document controls are only visible in the Edit mode.</i> Maximum number of attachments is three (3).
Working area box (drafts, references)	Add and delete attachments that relate to the task but are not considered part of the original tasking documentation or the official response. Post drafts, references, and any other documents related to the task in this box. <i>The browse for file option and mark for deletion option will only be visible in the edit mode.</i> Maximum number of attachments is fifteen (15).
Coordination Status See Section 5 Coordination Status for details	This checklist is created manually to summarize the people or groups given responsibility to respond to a task, including people or groups outside of the HQWeb system (if for example, they've had the task emailed to them). Click on the "Edit List" link to open up the edit box and to modify the people or groups who appear on this list. Once a person or group is added to the list, their name appears next to a picklist. When using the Create New Task / Edit Task view, a response status can be chosen from the picklist and manually updated. <i>Although a future change package may automatically add all people/groups assigned the Coordination role to the list, currently the entries in this box only appear if manually entered.</i>

	<p>When you "ADD" a new group, it will automatically populate in the last box on the right and when you hit submit it will capture that group and display it on the Tasker Form page. This new group that has been created is just for that tasker only, it is not logged into any other drop down list for future use. To remove this new group from your list, go to "edit the list of coordinators" and either double click on the group or highlight it and use the left arrow button to remove it.</p>
Assignment and Status	<p>Text box where anyone can update status of the tasker. The business rules define the format to be used for entries (Ex: "2/20/2002 Interim response submitted, due date extended to 3/15/2002") but the system simply treats this as a text box/memo field. The contents of this box do not appear in the history log and can be overwritten. Previously submitted comments appear in this box when opened. This will be a field commonly displayed on reports. It is intended to be a brief explanation of the current status of the task.</p>
Discussion Thread (Amplification, Comments, Questions)	<p>Click "Enter Comment" option to enter a comment, question, response, or associated information. This will be used to capture further amplification for the tasked codes, as well as the responses and comments that tasked respondents provide. Two lines of the text content will display when in read mode; clicking on the subject line will open the floating window with the full message.</p> <p>This function can also be used when viewing a task in read mode (i.e., the user doesn't have to click on the overall task Edit link, opening the Create New Task/Task Edit view, in order to enter a comment). To create a comment, the tasker must have already been created and saved. If try to create a comment on a new document, a prompt will display that says "Tasker must be saved before a comment can be added.")</p> <p>Note: User must click Submit option in order to capture the comment. If they just click the top right corner of the document to close it, their comments will not be captured.</p>
Assignments: Lead, Coordination, & Information	<p>LEFT COLUMN: The initial dropdown picklist in the box in the left column provides the N-code directorates.</p> <p>MIDDLE COLUMN: After choosing an N-code in the box in the left column (for example, N8), three groupings are shown. The largest groups are listed first (i.e., an entire Directorate, an entire Division), the smaller groups are listed next (i.e., Front Office groups) and then individuals are listed last.</p> <p>The sort option radio boxes appearing below the middle column selection box allows a sort of the box by Code (which is the default) or Last Name. When sorted on Last Name, the displayed list still shows the groups at the top and then lists all individuals in the format "Last Name, First Name Code".</p> <p>RIGHT COLUMN: Highlight the person/group to task in the middle column box, then click the right arrow to move the name of the person or group over to the assignment boxes in the right column. There are three assignment boxes in the right column (i.e., Lead, Coordination, and Information). From the final assignment boxes, users may highlight a name or group and click the left arrow to remove them from the list.</p>
Lead Assignment Block Mandatory Field	<p>Allows assignment of a person or group as the Lead for a task. Mandatory Field.</p> <p>The Lead Assignment selection is used to drive various functionalities. On the initial submission of the task (i.e., task creation), the person or group specified in this box:</p> <ol style="list-style-type: none"> 1. Receives an email notification <p>AND</p> <ol style="list-style-type: none"> 2. Is automatically appended to the bottom of the Chop Chain.
Coordination Assignment Block	<p>Allows assignment of people and/or groups a Coordination role for a task.</p> <p>Can assign multiple people/groups in Coordination function.</p> <p>On the initial submission of the task, each person or group in the Coordination Assignment block receives an email notification. If any change is made to the people or groups on this list, an email is generated to the added person.</p>
Information Assignment Block	<p>Allows the assignment of people and/or groups an Information role for a task. Can assign multiple people/groups for the Information function.</p> <p>On the initial submission of the task, each person or group in this box receives an email notification unless the "No email notification" option is checked. If any change is made to the people or groups on this list, an email is generated the added person.</p>

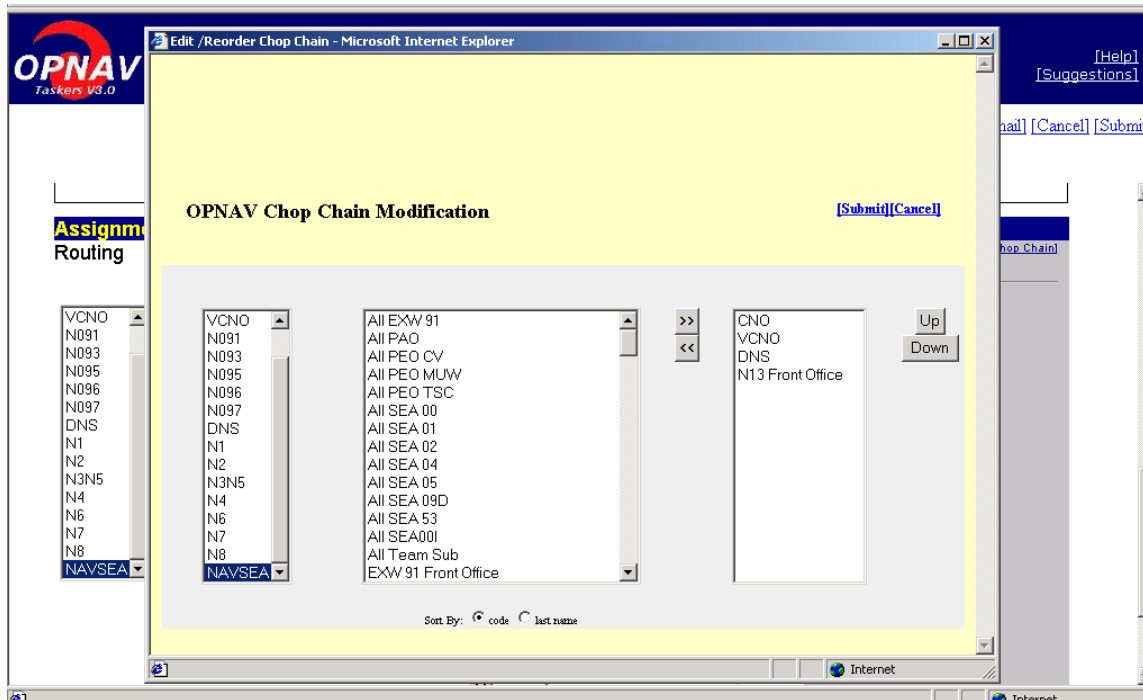
	<p>The “No email notification” option for the information block stops automatic notification from being generated to those people/groups in the Information Assignment box. If the “Restrict Access to Assignees” box near the top of the form is checked, the Information block can be then be used as a mechanism for limiting visibility of a task.</p> <p>To summarize, the Information block is performing double duty. It can be used to either specify the list of people/groups who receive email notification (along with those listed in Lead and Coordinate blocks) or specify the list of people/groups who receive access to a restricted task (along with those listed in Lead and Coordinate). The functionality of the block is affected by both the “Restrict Access to Assignees” and “No info email” checkboxes.</p>
OPNAV Chop Chain	<p>This is a series of check blocks that represent each step of the routing chain (showing codes) for a specific task including the final step of “Certified Complete by the Tasking Authority.” When an individual marks the task complete for one of the chop chain blocks, the name and date of the individual marking the task complete will appear to the right of the chop chain N-code. Likewise, if an individual unchecks a block, the date and name of that individual will appear in the tasker history.</p> <p>Anyone can mark any of these boxes complete. Anyone can uncheck a box. In either case (check or uncheck) the name and date associated with that change will be recorded. <i>To check or uncheck a box, must be in Edit Mode by clicking on “Edit” at the top right part of the screen.</i></p> <p>Every time a change in the assigned Lead is made, the newly assigned person/group is automatically added to bottom of chop chain. This means that the default Chop Chain path on the way up, will be the path that the task followed as it was assigned on the way down.</p> <p>Changes to the OPNAV Chop Chain also generate an <u>email notification</u>. To determine who should receive this email, start at the top of the list (including the final check by the Tasking Authority at the top), and move down to the lowest, contiguous, unchecked box. The person or group associated with that box should receive the notification. Once a box is checked and then a user un-checks it, then that person will receive an email notification indicating that they need to rework the tasker then send it back up the chop chain. <i>Additional information on email notifications can be found in Section 10 Email Notification.</i></p> <p>This approach should also address the situation where the senior is dissatisfied with the input of a subordinate. By un-checking the box of a subordinate, an email is generated to that subordinate. This is the same as the current system.</p> <p>“Certified complete by tasking authority” is what finally changes the status of the task to complete. The Tasking Authority is the only one who will have the option available to mark the “Certified complete” option. This option automatically appears at the top of all Chop Chains when they are created.</p> <p>If the OPNAV approval authority is CNO, then CNO, VCNO and DNS automatically appear in chop chain, for the first go round. (Thus, if they are later removed, it’s not reinserted.) When the VCNO is selected as the OPNAV Approval Authority, the DNS will automatically be listed in the chop chain. If DNS is selected then DNS and Lead are defaults, and if a Directorate is selected then the Directorate and the Lead are defaults in the chop.</p>
Tasker History Log	<p>Any time a change or addition is made to the tasker, an entry will be annotated in the Tasker History Log of that change (unless otherwise noted in the field description in this document). The entry will include the date and time of the action, the Name and Ncode of the individual making the change, an automated description of the change that was made (e.g., “Front Office Due Date” changed from 8/1/01 to 8/4/01).</p>

4. OPNAV Chop Chain Modification

The screenshot shows the OPNAV Taskers V3.0 interface. The top navigation bar includes links for My Taskers, Reports, Tasker Archives, Templates, [Help], and [Suggestions]. The main content area is titled 'Assignments and Chop Chain' and is divided into three sections: Routing, Lead, and Coordination. The Routing section contains a list of assignments with a dropdown menu set to 'NAVSEA'. The Lead section has a text box for 'N13 Front Office'. The Coordination section has a text box for 'EXW 91 Front Office'. The Information section has a text box for 'N122D1D ... LT Jill Alston'. On the right side, there is a 'Chop Chain' section with a link to 'Edit / Reorder Chop Chain' circled in red. Below this link are three checkboxes: 'CNO', 'VCNO', and 'N13 Front Office', all of which are currently unchecked.

VCNO	Assignment
N091	All EXW 91
N093	All PAO
N095	All PEO CV
N096	All PEO MUW
N097	All PEO TSC
DNS	All SEA 00
N1	All SEA 01
N2	All SEA 02
N3N5	All SEA 04
N4	All SEA 05
N6	All SEA 09D
N7	All SEA 53
N8	All SEA00I
NAVSEA	All Team Sub
	EXW 91 Front Office

Clicking on the “Edit / Reorder Chop Chain” link in the OPNAV Chop Chain area of the “Create/Edit Task” form or the “View Task” screen, allows the option to manually edit the chop chain. The mechanism for adding people/groups to the Chop Chain is similar to that used to add people/groups to the assignment boxes (i.e., Lead, Coordinate, Info boxes). Additions to the list automatically appear at the top of the list. The “Up” and “Down” buttons can be used to reorder the list. Clicking on “submit” returns the user to the previous view (either the “Create New Task / Edit Task” or the “View Task” screen) with the Chop Chain information updated.



Every time a change in the assigned Lead is made, *the newly assigned person/group is automatically added to bottom of chop chain*. This means that the *default Chop Chain path on the way up, will be the path that the task followed* as it was assigned on the way down.

Elements:	Functionality/Description:
Submit	Click Submit to create the chop chain list.
Cancel	Click Cancel to delete the changes you have made. Will return to the previous screen, either the Read or Edit mode of the task view.
Dropdown pick lists	The boxes in the left and middle columns are the same as those used in the 'Create New Task/ Edit Task' view with one exception, the "All" groups do not appear.
Sort option	See the description associated with the Lead Assignment block on the 'Create New Task/ Edit Task' view.
Left and right arrows	See the description associated with the Lead Assignment block on the 'Create New Task/ Edit Task' view.
Up/Down	Once the name of a person or group is selected in the right column, the Up/Down options can be clicked to alter the order of the list.
Status Indicators when in read mode	When a tasker is opened in read mode, the status of the chop will be displayed with "Christmas tree lights". If someone has marked the item complete, there will be a green light (and their name will be displayed). If a block hasn't been marked complete, there will be a red light.

5. Coordination Status

This is a manually controlled summary of the responses from the people and groups coordinating to answer the task. Although typically updated by the Lead AO, this list can be modified by anyone with access to the task. The Lead AO can use this as a “scorecard” of responses and those in the coordination role can use this as a means of communicating their inputs with the Lead.

Need pic of edit screen for coord status

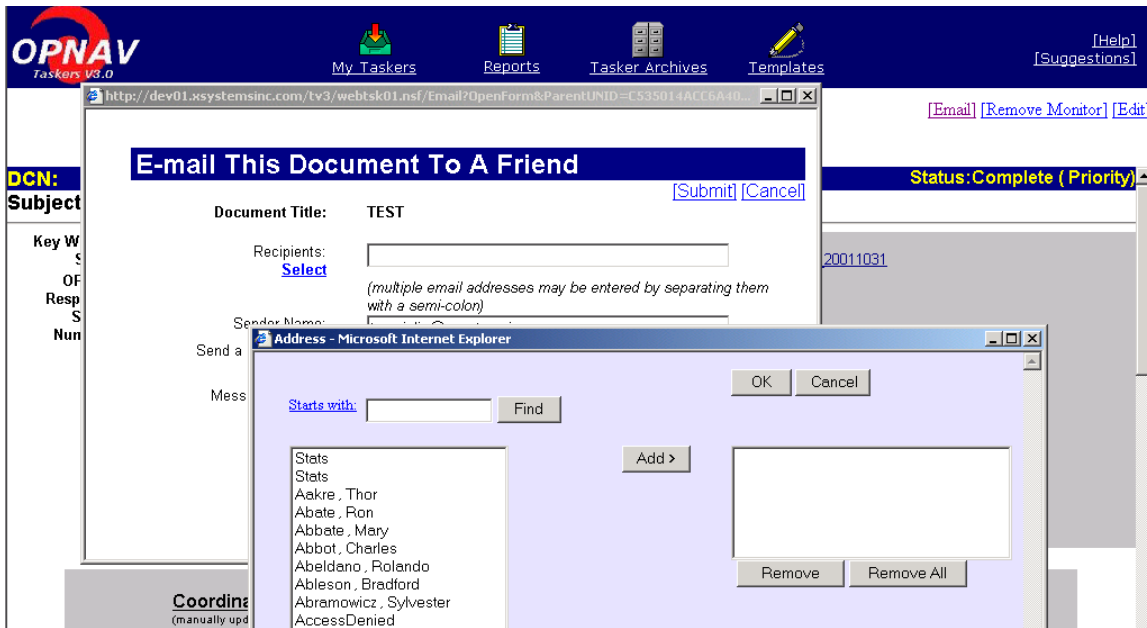
Elements:	Functionality/Description:
Submit	Click Submit to create the Coordination Status list.
Cancel	Click Cancel to discard the changes you have made and return to the previous page.
Left and right arrows	See the description associated with the Lead Assignment block on the ‘Create New Task/ Edit Task’ view.
Up/Down	Once the name of a person or group is selected in the right column, the Up/Down options can be clicked to alter the order of the list.
Create New Entry	<p>To track the response from a person, group, or organization that is not already listed. Type the name into the “Create New Entry” box and click the “Add” link. This will add the name to the box far right column. This new group that has been created is just for that tasker only, it is not logged into any other drop down list.</p> <p>To delete this new group or any other selected group, just double click on the group or highlight it and use the left arrow button to remove it.</p>

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6. Email Tasker

The “Email” at the top of the “Create New Task / Edit Task” and “View Task” screens link produces a dropdown pick list that provides access to a web-based email form with four different options affecting what information automatically appears in the body and who automatically appears in the “To” block. The addressees can either be looked up in the OPNAV address book or typed in by the user.

Elements:	Functionality/Description:
Email Status and Link to HQWeb User	Produces a web-based email form, allowing either the lookup of an addressee in the HQWeb address book or to type in an email address. In the body of the email, there will be two links (inside and outside the firewall) as well as the contents of the “Assignment and Status” block.
Email Status and Link to Assignees	Selecting this option generates the same email that is generated by the “Email Status and Link to HQWeb User” option. The difference is that the “To” field of the email form is automatically populated with the names/groups of anyone assigned a formal role on the task (i.e., Lead, Coordinate, Information). If the “No email notification for info” box is checked on the “Create a New Task / Edit Task” screen, then the addressees in the information role will be omitted.
Email Status and Link to Tasking Authority	Selecting this option generates the same email that is generated by the “Email Status and Link to HQWeb User” option. The difference is that the “To” field of the email form is automatically populated with the general name of the Tasking Authority (ex: CTTA) or the specific individuals name. Then when the form is submitted, it will look up specific users listed in that group and send the email to them.
Email Entire Tasker	Selecting this option opens the web-based email form with no addressees filled in. This option includes much of the data about the task and the key attachment. This option is primarily intended to provide a means of sending a task to someone who is not a member of HQWeb. Since such a person cannot use a link to view the task, the task contents must be sent in the body of the email or as attachments.



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7. View Tasker & Respond to Tasker

The “View Task and Respond to a Tasker” View is used by respondents to attach their documents and to insert comments as needed. Click on the Subject link of the tasker to be viewed and/or responded to in My Inbox or My Monitored. This opens the tasker in the view/read-only mode.

Elements:	Functionality/Description:
Email	Email options as above (See Section 6 Email Tasker)
Monitor this tasker	Click this option to have the tasker appear in your Monitored tasker list.
Remove Monitor	Click this option to remove a tasker from your monitored tasker list.
Edit	Click Edit to put in edit mode and respond.
Tasker Pkg box	Allows for the addition/deletion of attachments at the tasking authority level. The browse for file option and mark for deletion option will only be visible in the edit mode. Edit in place option will be available.
Response box	Allows for the addition/deletion of attachments. The browse for file option and mark for deletion option will only be visible in the edit mode. Edit in place option will be available.
Coordination Status	Coordination (chop) Responded: checklist created manually via a form (Section 5 Coordination Status), to select who is given responsibility (outside of HQweb system) to respond to a tasker (for example, if they’ve had content emailed to them). Click on the edit option to open up the Responded edit box, to create the list or to mark who has responded.
Working area box	Allows for the addition/deletion of attachments by any user. The browse for file option and mark for deletion option will only be visible in the edit mode. Edit in place option will be available.
Status	"Status" comments can be added by anyone. This is where the AO, directorate and front office enter status comments such as “2/21/02 OLA chopped, 2/22/02 w/N7, 2/23/02 w/DNS, 2/24/02 CNO /s/ hand carried to SECNAV”.
Discussion Thread	Click “Enter Comment” option to enter a comment or response.
Restricted Tasker Box	Selecting this radio box restricts the viewing of the tasker to only those in the final assignment boxes. Subject of Tasker will only appear in reports accessed by those same individuals or the tasking authority.
Tasker History Log	Any time a change or addition is made to the tasker, an entry will be annotated in the Tasker History Log of that change. The entry will include the date and time of the action, the Name and Ncode of the individual making the change, an automated description of the change that was made (e.g., “Front Office Due Date” changed from 8/1/01 to 8/4/01), and any amplifying information entered by the individual making the change.

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8. Enter Comment – Discussion Thread

OLA Do not concur

Discussion Thread (Amplification, Comments, Questions) [\[Enter Comment\]](#)

... RE: TEST - EXW CAPT Joe R Mart
test comments

Assignments and Chop Ch Routing

Lead: N13 Front Office

Coordination: N1 Front Office

Discussion Comment [\[Submit\]](#) [\[Cancel\]](#)

TEST

Responder: N131E2 CIV/GS-12 Katy Wei

Subject: RE: TEST

http://dev01.xsystemsinc.com/tv3/webtsk01.nsf/Response?OpenForm&ParentUNID=CS35014ACC6...

Click “Enter Comment” option to enter a comment, question, response, or associated information. This will be used to capture further amplification for the tasked codes, as well as the responses and comments that tasked respondents provide. Two lines of the text content will display when in read mode. Click on the subject line to open the floating window with the full message.

This function can also be used when viewing a task in read mode.

Each discussion thread will be automatically labeled with the following:

- Subject of thread (this is an editable textbox)
- Date and time of entry
- Code, rank, and name of person making the entry will appear as the Point of Contact.

(This information is Not logged in tasker history)

Elements:	Functionality/Description:
Submit	Click Submit to create the comment. Note: User must click Submit option in order to capture the comment. If they just click the top right corner of the document to close it, their comments will not be captured.
Cancel	Click Cancel to delete the changes you have made.

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9. Reports View

Due	Subject	Tasking Authority	Assigned Lead	DCN
N1				
5/24/02	Chop Chain Retest 04_24_02	N1	N1D2 ... AAA Teresa Ball	2002UN1-000002b
4/26/02	Submit Retest	N1	P00S10 ... YN3 Veronica Vaun	2002UN1-000002b
5/10/02	This is a test 04_25_02	N1	P00S10 ... YN3 Veronica Vaun	2002UN1-000005b
N12				
N61				

This view is similar to the management view in Taskers V2.0. The key differences are the removal of the Internal/External picklist and the addition of an “Export to Spreadsheet” option.

Search from this view, and you will search that directorate’s tasks. If you want to search all taskers, click on [Advanced Search](#).



Explanation of who sees which taskers in the reports:

Everyone in the assigned list (lead, coord, info), their directorate reports will show their taskers if they are in that role. Ex: If anyone in N1 logs in and clicks on reports, they’ll see any taskers that anyone in N1 has been assigned lead, coordinator, or info on.

Tasking authority: If N8 creates tasker and assigns a tasker to N1, N8 will see those taskers they have assigned as TA.

If you’re in chop chain and it’s your turn to chop it, you will get email notification and it’ll appear in My Inbox, awaiting your work.

What you won’t see... If you’re just in chop chain, but haven’t been assigned lead, coordination, etc, and if you’re not the TA then you won’t see that tasker in your reports.

Elements:	Functionality/Description:
Create Tasker	Links to form to create a new tasker. Opens New Tasker form.
...Status (drop-down pick list)	Provides the following sort options in the dropdown: <ul style="list-style-type: none"> All Active

	<ul style="list-style-type: none"> ▪ Unassigned ▪ Unassigned AO ▪ In Process ▪ Complete ▪ Due in next 14 Days ▪ Due in next 7 Days ▪ Due Today ▪ Overdue
...Sort by (drop-down pick list)	Provides the following sort options in the dropdown: <ul style="list-style-type: none"> • Office • Staff
Displayed Report Heading	The heading on the Report View is: <ul style="list-style-type: none"> • Due Date – External Due Date is displayed • Subject: link to tasker • Tasking Authority • Assigned Lead • Internal DCN
Export to Excel: All Fields	Sends all fields to an Excel spreadsheet: The spreadsheet will be sorted based on Tasking Authority Due Date.
Export to Excel: Key Fields	What are the key fields that are exported?

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10. Email Notification



On the initial submission/creation of the task, the person(s) or groups specified in the lead assignment, coordination assignment, and information assignment will receive an email notification for the tasker.

If any change is made to the people or groups in these lists, an email is generated to the added person(s)/groups.

If the “No email notification” option is checked for the information block then no notification will be generated to those people/groups in the Information Assignment box.

Changes to the OPNAV Chop Chain also generates an email notification. To determine who will receive this email, start at the top of the list (including the final check by the Tasking Authority at the top), and move down to the lowest, contiguous, unchecked box. The person or group associated with that box should receive the notification. Once a box is checked and then a user unchecks it, then that person will receive an email notification indicating that they need to rework the tasker then send it back up the chop chain.

If you're in chop chain and it's your turn to chop it, you will get email notification and it'll appear in My Inbox, awaiting your work.

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11. Appendix – Translating a Tasker Lead

These documents are currently posted in HQWeb as a separate Power Point file. They will be incorporated into this document at a later date.